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Temple Bar Visitors Survey, 2012

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TEMPLE BAR VISITOR SURVEY 2012

Implementing the DIT-ACHIEV Model for Sustainable Tourism Planning



The *DIT-ACHIEV Model for Sustainable Tourism Planning* has been developed by the College of Arts and Tourism, Dublin Institute of Technology. It explores six core areas of interest - **A**dministration, **C**ommunity, **H**eritage, **I**nfrastructure, **E**nterprise and **V**isitor.

The purpose of implementing this Model in Temple Bar (facilitated by IRCHSS funding) is to test its use in an Irish urban tourism destination.

In addition to data such as environmental measurements, information on water, waste, energy, transport, examination of local cultural, landscape and employment, the Model requires the undertaking of three dedicated surveys:

- A Visitor Survey
- A Business Survey
- A Resident Survey

A Resident Survey of Temple Bar took place between

March and May 2012 with the support of DIT students. A Business Survey took place in May 2012.

Generally there is a positive attitude by tourists to Temple Bar

This publication presents an overview of the findings from the **Visitor Survey** work which took place in Temple Bar. The main data are from a survey which took place in the surrounding areas of Temple Bar in August 2012 to investigate if people were visiting the area, and sought their opinion of the tourist destination. At the end of this report some results are presented from a survey which ran between June 2011, and June 2012 .

The report presents the attitudes and opinions of visitors regarding tourism in Temple Bar and while some issues have emerged, the general response to the survey is that Temple Bar visitors are very positive.

Note: Given the survey was run over a week in August, caution should be taken when reviewing this report as it is not seasonally representative. However, the 344 responses do provide an insight into the thoughts of visitors regarding tourism in Temple Bar.

Project Background

In early 2011 a group of researchers from the Dublin Institute of Technology (DIT) began working with a team in Temple Bar to explore the sustainability of tourism in the area and plan for its future.

Team Temple Bar is composed of six local partners:

- Temple Bar Traders
- Temple Bar Cultural Trust
- Tourism Ireland
- Dublin Tourism (which has since become part of Fáilte Ireland)
- Dublin City Council
- The Morgan Hotel

During the 12 months of the project, the following key activities took place:

- In June 2011 a very well attended public consultation meeting took place to identify the key issues and challenges for tourism in Temple Bar. The wide range of representation at this meeting included among others, local restaurant, pub, hotel and gallery owners,

An Garda Síochána, representatives from voluntary and state agencies, public representatives etc. This meeting resulted in the identification of numerous potential sustainable tourism indicators.

- Subsequently, regular steering committee meetings took place to discuss and analyse project progress with the aim of ensuring that the project remained on track and to tackle emerging issues relating to the collection of data.
- A meeting with administration personnel took place in June 2012 to discuss the management of tourism issues in Temple Bar.
- A number of presentations have been made by the project team at national and international conferences, raising the profile of the project and Temple Bar.

Early indications are that the Model provides the Irish Tourism Industry with a valuable tool for sustainable tourism planning at a destination level.

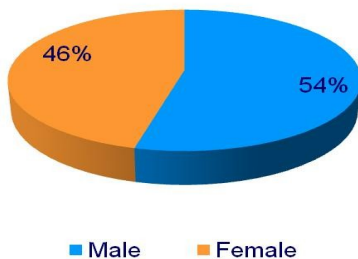
Survey Details

This survey was carried out amongst tourists and residents in Dublin. Irish residents were surveyed to establish their view of tourism in Temple Bar, if they consider it a place where they like to socialise and if they consider it a worthwhile tourism amenity for Dublin. People from 21 countries other than Ireland were interviewed.

Visitor Profile

Gender / Age: 54% of those surveyed were female ([See Figure 1](#)) and over half (51%) of all respondents were aged between 18 and 34 ([See Figure 2](#))

Gender

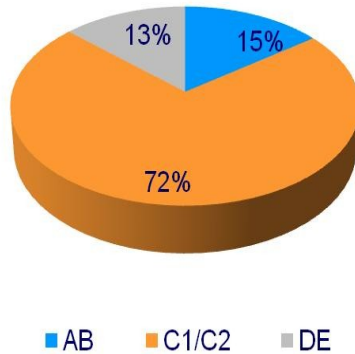


Age Group



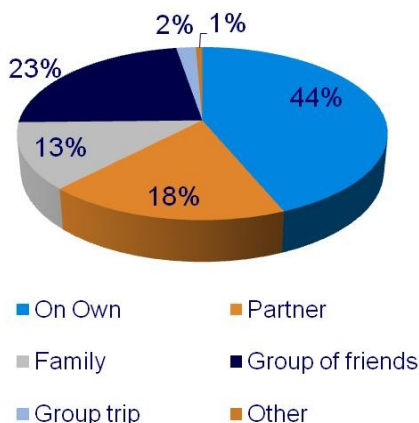
Social Class: Respondents were asked their occupation and [Figure 3](#) shows the majority were C1/C2 which includes sales people, bank clerks, supervisory, clerical workers, junior managers, and skilled manual workers such as electricians and carpenters. Those classified as group D/E include the unemployed.

Social Class



Party Composition: 62% were travelling either on their own (44%) or with a partner (18%). Those travelling alone were largely resident in Dublin or the surrounding counties. ([See Figure 4](#))

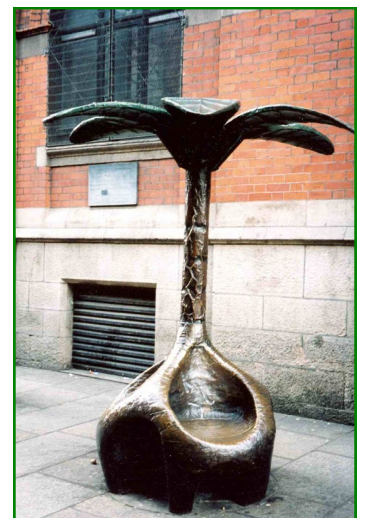
Travel Group



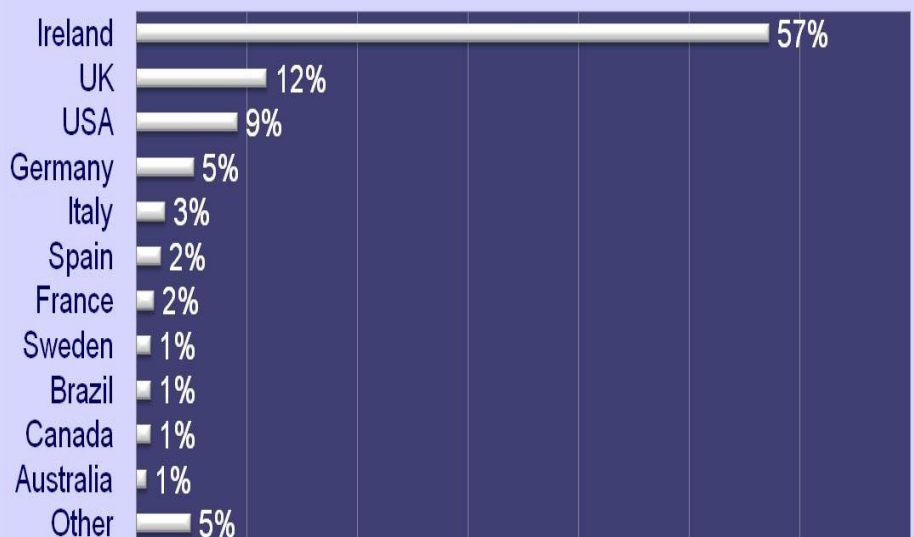
Nationality / Origin of Respondents

Main Source Markets: Over half (57%) of those surveyed were from Ireland. 12% were visiting from the UK and 9% were visiting from the USA. ([See Figure 5](#)) This is in line with Ireland's largest markets with approximately 66% of visitors to Ireland coming from the UK and the USA each year. 'Other' respondents include individuals from Russia, Lithuania, Ukraine, Belgium, Austria, Switzerland, South Africa, Romania, Denmark, New Zealand and Japan.

Three quarters of non-Irish residents who answered the surveys were tourists with the remainder claiming to work or attend college in Dublin.



Country of Residence



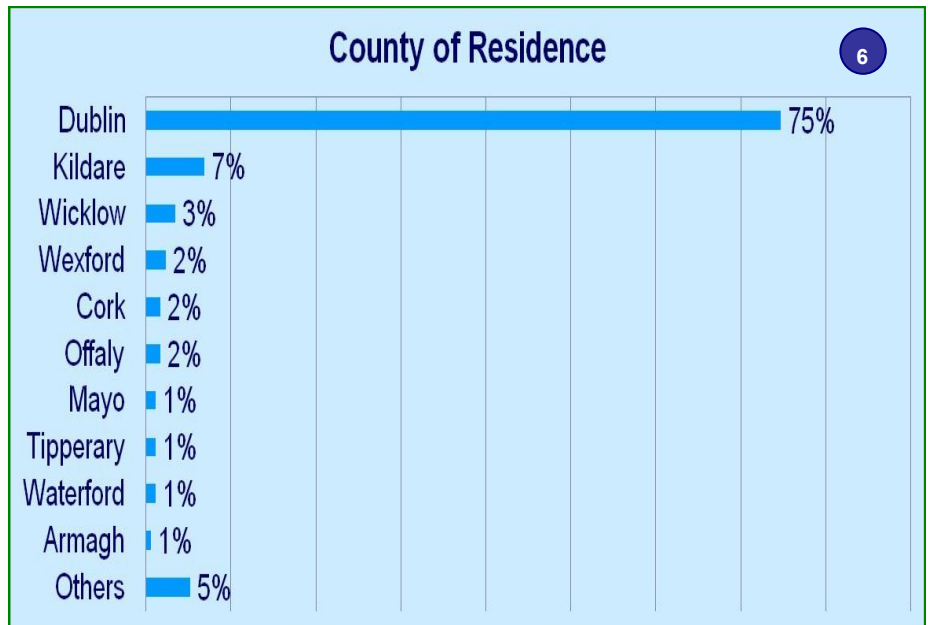
Visitors from the Republic of Ireland: The majority of Domestic visitors indicated they were from Dublin (75%). 7% were from Kildare, and 3% from Wicklow. The 'other' counties refer to Carlow, Clare, Galway, Kerry, Kilkenny, Laois, Meath, Monaghan and Tyrone giving a combined total of 5% as summarised in **Figure 6**. Only 3% of respondents from Ireland considered themselves to be visitors in Dublin.

Why Choose Dublin

34% of respondents were undertaking tourist activities in Dublin. The proportion of tourists was higher among older age groups and lowest in the 18-24 age group at 13% (**See Figure 7**). Shoppers were also most likely to be in the older age group. Only a small proportion of people from Ireland were involved in tourist activities. A large proportion of tourists (47%) were classified as AB which includes employers, managers and higher professionals.

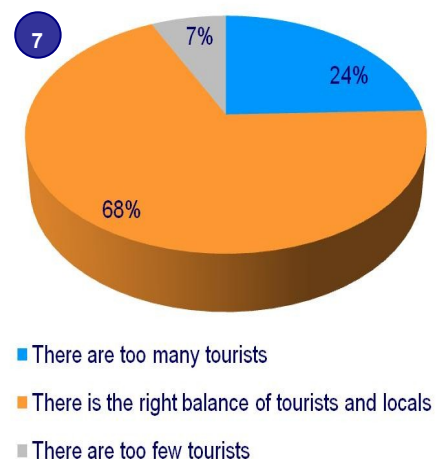
Crowding in Temple Bar

Visitor Perception of Crowding: Almost one quarter (24%) of respondents feel that there are too many tourists in Temple Bar. 68% how-

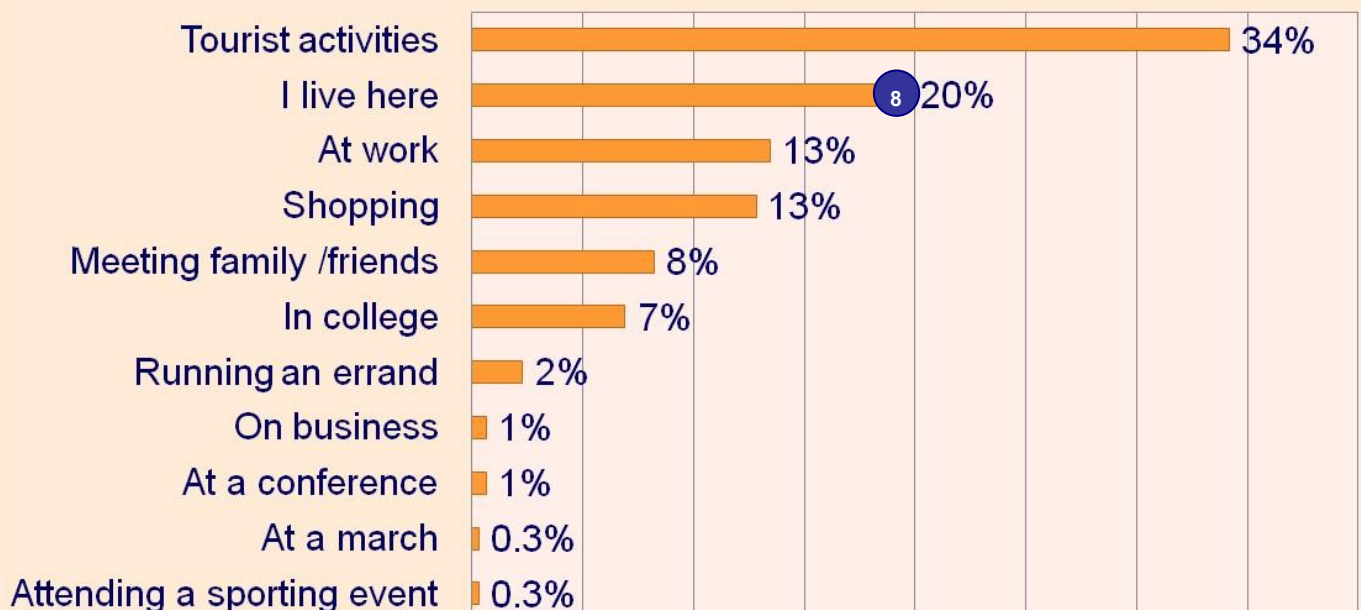


ever are happy with the number of tourists and feel that the balance is right between tourists and locals. 7% would like to see more tourists in Temple Bar (**See Figure 8**). Those over 65 years are more likely to believe that there are too many tourists. Similarly, lower social classes are more likely to believe that there are too many tourists however this result may be due to the fact that the tourists interviewed were mostly in the higher social class.

View on Tourists in Temple Bar



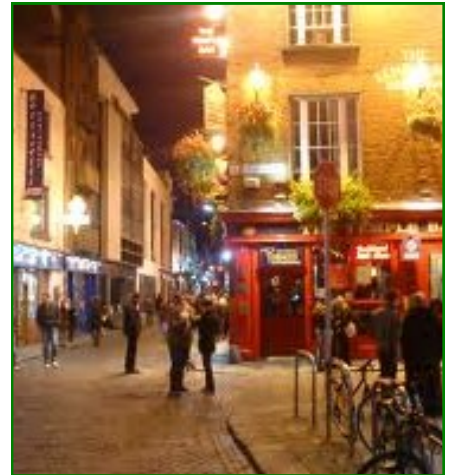
Main Reason for being in Dublin



Main Tourist Areas in Dublin

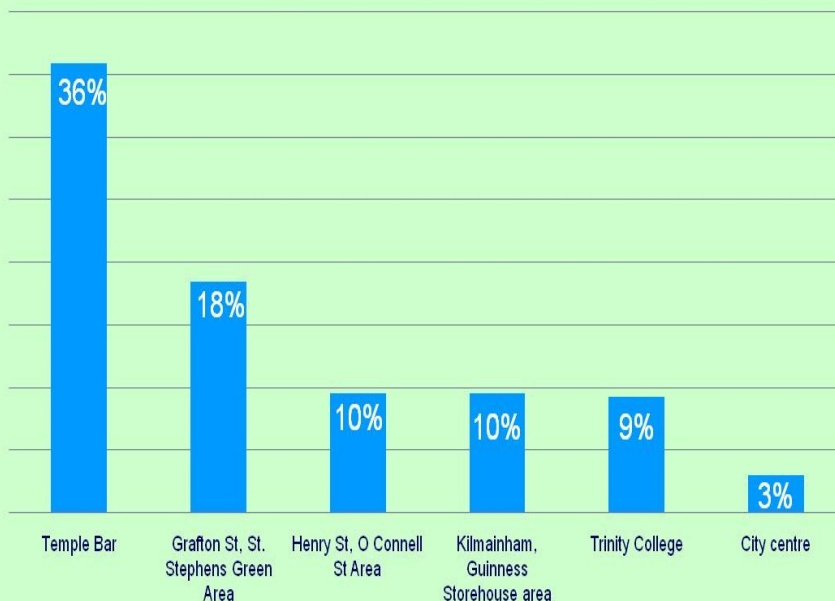
When respondents were asked what they consider to be the main tourist area in Dublin, the majority (36%) cited Temple Bar. 18% consider Grafton St and the St. Stephen's Green area to be the primary tourist area and 5% don't know. Responses grouped as 'Other' include the North and South Dublin Coast, St. Patrick's Cathedral area, Croke Park and the O2 (**See Figure 9**).

Temple Bar and Grafton St were named by more Irish residents than visitors while Kilmainham and the Guinness Storehouse Area were cited more often by tourists than residents. Half the 18-24 and 45% of the 25-34 age-group named Temple Bar as primary tourist area but the proportion was much lower among the over 35s. The Kilmainham / Guinness Storehouse area was named most by 65+ age-group and Trinity College by those between 45 and 64.



Primary Tourist Area in Dublin

9

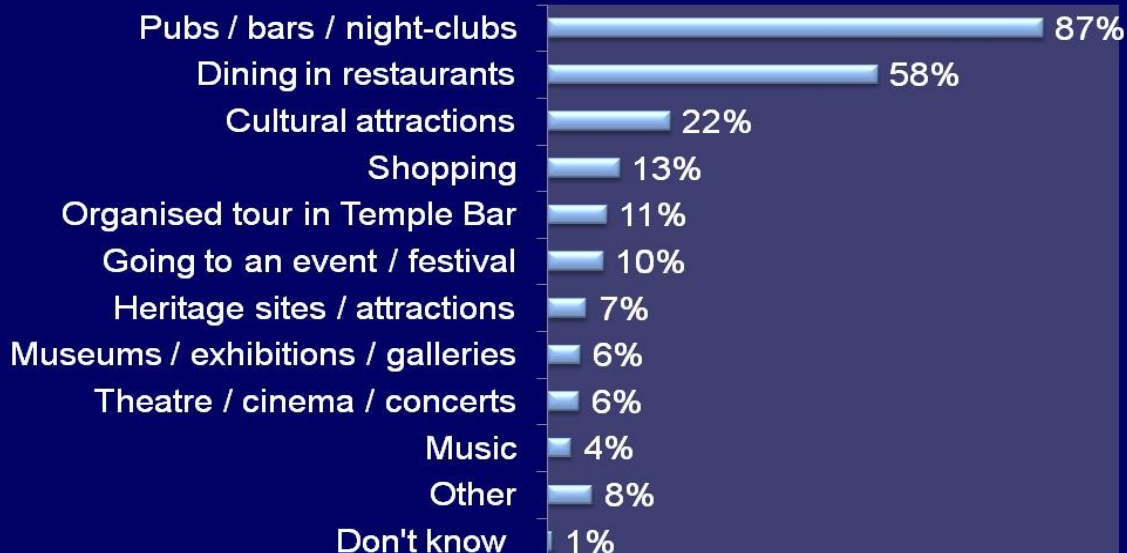


Activities associated with Temple Bar

Pubs and dining in restaurants are by far the activities most associated with Temple Bar by all age groups interviewed (**See Figure 10**). Association of Temple Bar with pubs increases as social class lowers. Otherwise there is little variation between social class and the activities they associate with Temple Bar. Association with activities other than pubs and dining in restaurants is relatively low with only 7% noting its heritage sites and attractions, and 6% noting its museums, exhibitions and galleries. 1% don't know what activities Temple Bar is famous for.

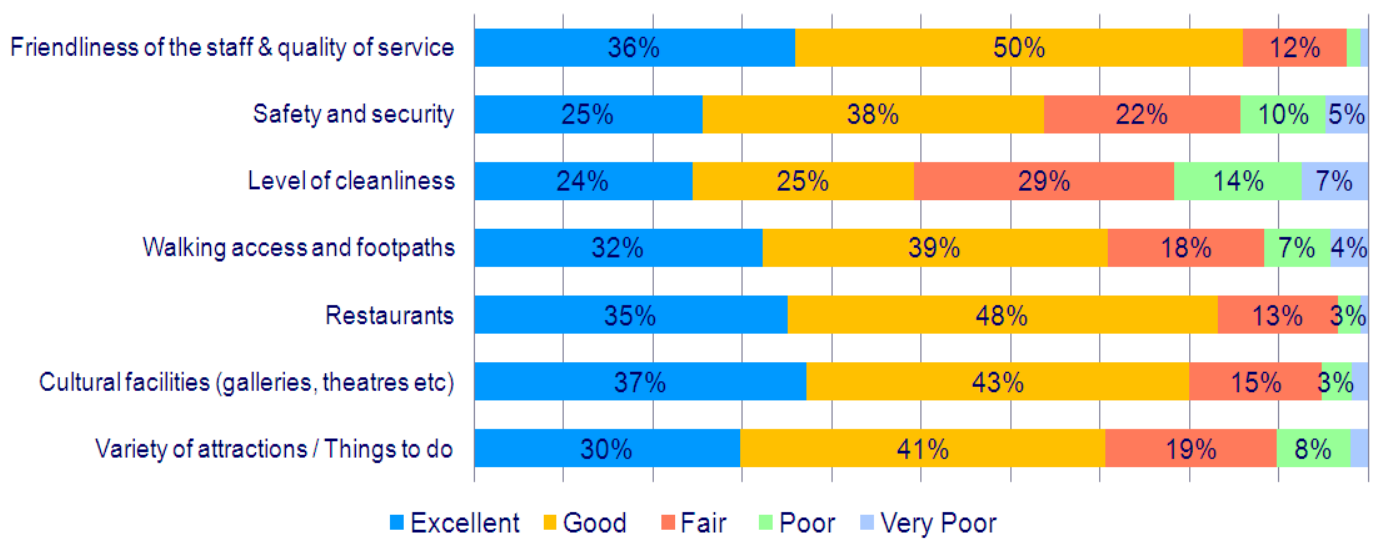
Activities Associated with Temple Bar

10



Experience of People and Facilities in Temple Bar

11



Overall Satisfaction with Temple Bar

Satisfaction with Temple Bar:

Levels of satisfaction with various experiences of people and facilities in Temple Bar are generally very good. **Figure 11** shows that 86% of respondents thought that the friendliness of the staff and quality of service in Temple Bar was Excellent (36%) or Good (50%). In line with this was a similarly positive experience of restaurants in the area. There was less satisfaction with the level of cleanliness in the area with 21% being unhappy, rating

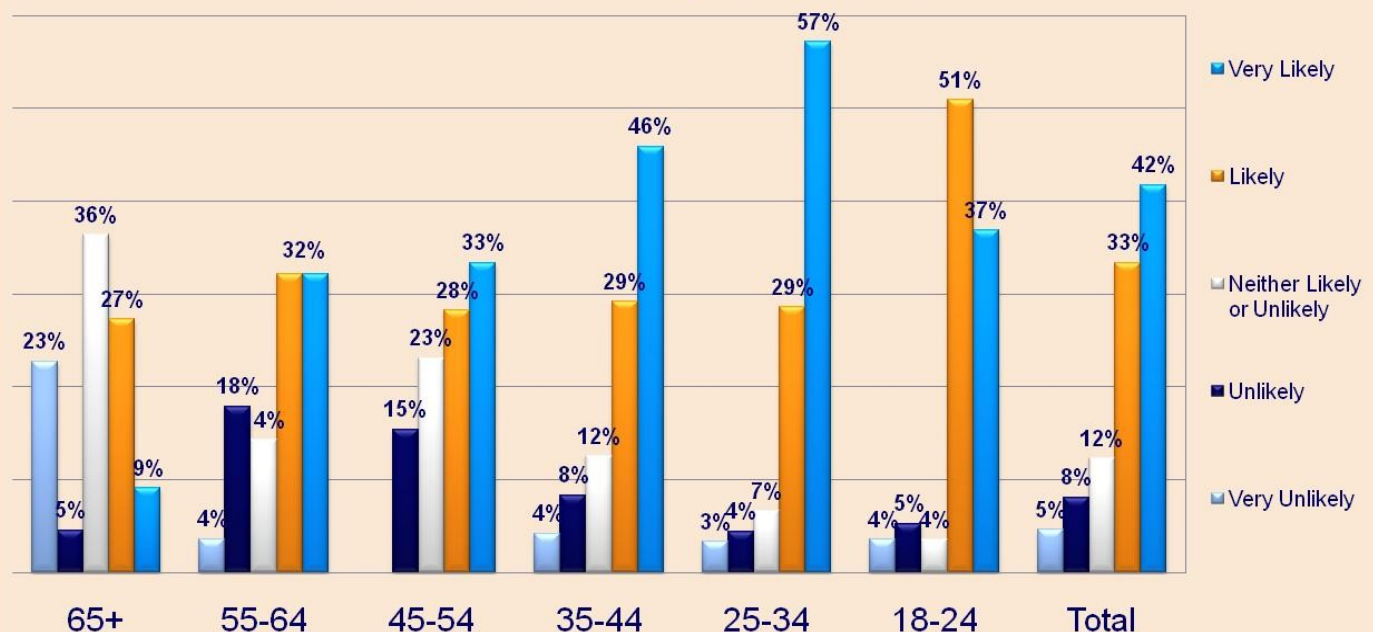
it to be Poor (14%) or Very Poor (7%). 15% consider safety and security in Temple Bar to be Poor (10%) or Very Poor (5%). Further analysis reveals that the greatest dissatisfaction (regarding cleanliness and safety) came from Irish respondents (24% & 16% respectively) less than 6% of UK and USA respondents were dissatisfied in both instances

While there was little association between Temple Bar and cultural activities as outlined in **Figure 11**, there is a high level of satisfaction with the amenities and facilities in Temple Bar overall.

Recommend Temple Bar to a friend: When asked if they were likely to recommend Temple Bar as a tourism destination to a friend, overall, respondents were very likely to do so. In total, three quarters of respondents are likely or very likely to recommend Temple Bar with little variation by country of residence.

The 25-34 age group were most likely with 35-44 next most likely (**See Figure 12**). There are big variations by age group. Over 65s however had a distinctly different answer and there was a high number of respondents unlikely or very unlikely to recommend the destination to a friend.

Recommend Temple Bar to a Friend



Research Tools

The findings of this report are derived primarily from a survey undertaken in August 2012. An earlier survey took place during the period June 2011 to June 2012. It was intended to collect surveys over a 12 months period which would be weighted according to season. The survey was to be undertaken in locations such as hotels, restaurants, galleries, pubs, etc. throughout Temple Bar by local volunteers identified by the project

Steering Committee. Unlike the researcher's experience in other destinations, participation by local businesses and organisations in this part of the project was very poor and thus, over the 12 month period only 43 surveys were collected by volunteers participating in the project. In order to salvage some information from the process, the following are some useful comments made by the respondents.

What Visitors think about Temple Bar

- The majority of visitors came to Temple Bar based on recommendations from friends and relatives.
- A number of respondents used social media to share their experience with others, with most noting Facebook, Twitter or Instagram.
- When respondents were asked if there was any facility that they needed but could not find in Temple Bar, responses included ATMs and public toilets.
- The majority of visitors had visited Temple Bar twice in the last 10 years, indicating a high level of repeat business.
- When asked how much of their total spend would be made in Temple Bar, the most frequent answer was in the region of 60%.
- Comparing the cost of visiting Dublin with similar locations they have visited, most visitors consider Dublin to be more expensive.
- Visitor's best experience in Temple Bar included atmosphere, culture, food markets, Irish music and dancing, pubs and the nightlife.
- Worst experiences included high levels of noise, drunk people, lack of outdoor seating, signage and the cost.

Sample Visitor Comments

The following is a selection of quotes from visitors:

Cobble stones add to the atmosphere of Temple Bar but they are very hard to walk on!

Too many drunk people on the streets.

We could hear lots of noise from our hotel room at night time.

I would recommend Temple Bar if you want to engage in tourist activities but not if you want to experience genuine Dublin.

Temple Bar needs to keep local cafes and not big chains.

I would like to be able to visit galleries and museums in the evening but everything closes at 5/6pm.

I love Temple Bar !

